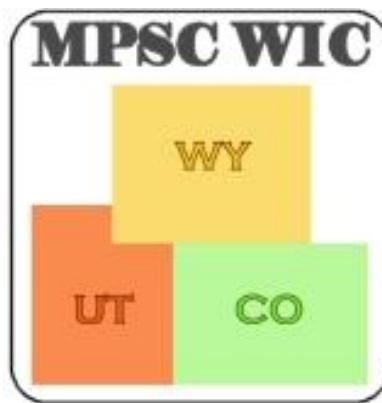# Mountain Plains States Consortium
WIC System Project

DDI DELIVERABLE #07

SA 4 SYSTEM ADMINISTRATION SCHEDULER SCREENS DFDD

(DETAILED FUNCTIONAL DESIGN DOCUMENT)

Presented to:

Revision Date: December 21, 2007

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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision
8/23/07	CIBER	MPSC	Revision Version
11/30/07	CIBER	MPSC	Final Version
12/21/07	CIBER	MPSC	Updated Final Version

Table of Contents

1   Master Schedule/Template

This screen operates in two modes; a mode for editing the master schedule and a mode for editing schedule templates. The modes can be switched by selecting either "Master Schedule" or "Template" from the Mode List box.

Master Schedule mode provides the ability to create flexible clinic master schedules. This includes defining hours of operation, definition of columns within the clinic master schedule, open appointment slots, and staff personal appointments.

Template mode provides the ability to define templates, which contain all the same things as a master schedule but are not associated with a particular day. The templates may be saved and applied to particular days. When in Template mode, the Calendar control and "Copy This Day" section are hidden and no date is shown in the schedule columns. Examples of templates might be a template for Mondays with no Nutrition Education Classes and a template for Mondays with Nutrition Education classes.

Master Schedule mode:

> *Scheduler Administration > Master Schedule/Template*

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Template mode:

> Scheduler Administration > Master Schedule/Template

Control	Description		
Mode	This List box is used to select which mode the screen should operate in. The two options are Master Schedule for maintaining the master schedule of a clinic and Template for maintaining templates for a clinic.		
	Type	List Box	
	Required	Yes	
	DB Column	Not Stored	

	Code ID	Schedule Mode
		This code element is non-editable.
		The installed values are:
		  Master Schedule
		  Template	

LA-Clinic	This is the local agency and clinic for which the Master Schedule is being made. Only local agencies and clinics that the user has access to are listed.		
	Type	List Box	
	Required	Yes	
	DB Column	MasterSchedule.Clinic_ID	
	Code ID	LocalAgency table lookup	
Open	The Open radio button indicates that the clinic is open on the date selected on the calendar.		
	Type	Radio button	
	Required	No	
	DB Column	MasterSchedule.ID	
Unlabeled (Open Time)	This is the time that the clinic opens on the date selected on the calendar.		
	Type	Spin Control	
	Required	Yes, if the Open radio button is selected.	
	Display Only	No	**Calculated** No
	DB Column	MasterSchedule.OpenTime	
Unlabeled (Close Time)	This is the time that the clinic closes on the date selected on the calendar.		
	Type	Spin Control	
	Required	Yes, if the Open radio button is selected.	
	Display Only	No	**Calculated** No
	DB Column	MasterSchedule.CloseTime	

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Control	Description			
Closed	The Closed radio button indicates that the clinic is closed for the full day on the date selected on the calendar.			
	Type	Radio button		
	Required	No		
	DB Column	MasterSchedule.ClosedReason		
Unlabeled (Closed Reason)	This is the text to display when the clinic is closed.			
	Type	Text Box		
	Required	Yes, if the Close radio button is selected		
	Length	30		
	Validation	NA		
	Display Only	No	**Calculated**	No
	DB Column	MasterSchedule.ClosedReason		
Holiday	The Holiday radio button indicates that the clinic is closed on the date selected on the calendar because of a holiday.			
	Type	Radio button		
	Required	No		
	DB Column	MasterSchedule.HolidayName		
Unlabeled (Holiday Name)	This is the text to display when the clinic is closed for a holiday.			
	Type	Text Box		
	Required	Yes, if the Holiday radio button is selected		
	Length	30		
	Validation	NA		
	Display Only	No	**Calculated**	No
	DB Column	MasterSchedule.HolidayName		
Calendar	A Calendar appears on the left side of the screen. The calendar enables the user to select a date for which they want to setup a Master Schedule. The current month is displayed initially. The user can scroll through months with the arrow buttons on either side of the month name. Days with a Master Schedule for the selected clinic appear bolded. A blue shaded box indicates the currently selected day. A red outlined box indicates today's date.			
	Type	Calendar		
	Display Only	No		

Control	Description			
Unlabeled (Schedule)	The Schedule control displays the Master Schedule for the selected day(s). Double clicking within the schedule control opens the Open Appointment Type pop-up. The Open Appointment Slot pop-up is where information about the open slot can be entered. See Open Appointment Type pop-up for more information.			
	Type	Schedule		
	Display Only	Yes		
Time Ruler	The time ruler is displayed on the left side of scheduler. It shows the hours and minutes of the day. Each hour is broken down into time slots which can be adjusted by right clicking on the time bar and selecting a different interval from the context menu.			
	Format	Alphanumeric	**Calculated**	No
	DB Column	NA		
Unlabeled (Clinic Schedule Column Name)	The designated name associated with the column. The column name can be a specific staff member's name or a general heading such as CPA.			
	Format	Alphanumeric	**Calculated**	No
	DB Column	MasterScheduleColumn.DisplayText		
Displayed Columns Plus (![+]) Control	At the bottom right of the schedule control are several buttons that control how many Clinic Schedule Columns are shown at one time without scrolling. The Plus control increases the number of Clinic Schedule Columns that are shown at one time without scrolling.			
	Type	Button		
	Hot Key	None		
Displayed Columns Minus (![-]) Control	At the bottom right of the schedule control are several buttons that control how many Clinic Schedule Columns are shown at one time without scrolling. The Minus control decreases the number of Clinic Schedule Columns that are shown at one time without scrolling.			
	Type	Button		
	Hot Key	None		
Displayed Columns First (![|◄◄]) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The First control scrolls the Clinic Schedule Columns so that the first column is displayed at the far left of the Schedule window.			
	Type	Button		
	Hot Key	None		

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Control	Description	
Displayed Columns Previous Page (⏮) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Previous Page control scrolls the previous page of Clinic Schedule Columns into view.	
	Type	Button
	Hot Key	None
Displayed Columns Previous (◀) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Previous control scrolls the previous Clinic Schedule Column into view.	
	Type	Button
	Hot Key	None
Displayed Columns Next (▶) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Next control scrolls the next Clinic Schedule Column into view.	
	Type	Button
	Hot Key	None
Displayed Columns Next Page (⏭) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Next Page control scrolls the next page of Clinic Schedule Columns into view.	
	Type	Button
	Hot Key	None
Displayed Columns Last (⏭) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Last control scrolls the Clinic Schedule Columns so that the last column is displayed at the far right of the Schedule window.	
	Type	Button
	Hot Key	None
Copy This Day - To the next	Selecting this radio button causes the selected day's schedule to be copied to the number of days specified when the Copy button is pressed. For example, if this radio button is selected, and 52 is entered into the following text box, and the Mondays checkbox is checked, then the selected day's scheduled will be copied into the next 52 Mondays.	
	Type	Radio Button
	Required	No
	DB Column	NA

Control	Description		
Copy This Day - Unlabeled (next to the "To the next" radio button)	This text box is used to enter the number of days to copy the selected day's schedule to when the Copy button is pressed.		
	Type	Text Box	
	Required	Yes, if the To the next radio button is selected.	
	Length	2	
	Validation	Numeric, Mask of 99 (must be less than 52)	
	Display Only	No	**Calculated**	No
	DB Column	NA	
Copy This Day - To every selected day	Selecting this radio button causes the selected day's schedule to be copied to every day specified within the Starting and Ending dates when the Copy button is pressed. For example, if this radio button is selected, and the Starting and Ending dates are 1/1/2008 and 3/31/2008 respectively, and the Mondays checkbox is checked, then the selected day's schedule will be copied into every Monday between and including 1/2/2008 and 3/31/2008.		
	Type	Radio Button	
	Required	No	
	DB Column	NA	
Copy This Day - Starting	This date is the first date to copy the selected day's schedule into when the "To every selected day" radio button is selected and the Copy button is pressed.		
	Type	Date Picker	
	Required	Yes, if To every selected day is selected	
	Display Only	No	**Calculated**	No
	DB Column	Not Stored	
Copy This Day - Ending	This date is the last date to copy the selected day's schedule into when the "To every selected day" radio button is selected and the Copy button is pressed.		
	Type	Date Picker	
	Required	Yes, if To every selected day is selected	
	Display Only	No	**Calculated**	No
	DB Column	Not Stored	

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Control	Description			
Copy This Day - Mondays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Mondays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	NA		
Copy This Day - Tuesdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Tuesdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	NA		
Copy This Day - Wednesdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Wednesdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	NA		
Copy This Day - Thursdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Thursdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	NA		
Copy This Day - Fridays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Fridays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	NA		

Control	Description		
Copy This Day - Saturdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Saturdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.		
	Type	Check Box	
	Display Only	No	**Calculated**	No
	DB Column	NA	
Copy This Day - Sundays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Sundays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.		
	Type	Check Box	
	Display Only	No	**Calculated**	No
	DB Column	NA	
Copy This Day - Copy	Clicking the Copy button causes the selected day's schedule to be copied to the days specified in the "Copy this day" group box.		
	Type	Command Button	
	Hot Key	None	
Column - Name	This text box is used to enter a column name to display for a column in the schedule. If a Staff Person is associated with the column the staff person's name is automatically entered into this textbox however it may still be changed. When an already established schedule is accessed and the name is changed, the Change Column pop-up is displayed to associate a time period to the name change. See Change Column Pop-up for more information.		
	Type	Text Box	
	Required	Yes, before saving as a Template or before applying to a day	
	Length	65	
	Validation	NA	
	Display Only	No	**Calculated**	No
	DB Column	MasterScheduleColumn.DisplayText or MasterScheduleColumn.Stfp_ID	

Control	Description	
Column - Type	This list box is used to associate a WIC appointment type, such as Certification or Recertification, with a column. If an appointment with a type other than that associated with the column is later added to the column a warning is displayed.	
	Type	List Box
	Required	No
	DB Column	MasterScheduleColumn.AppointmentTypeCd

	Code ID	WICAppointmentTypeCd
		This code element is editable but these installed values are non-editable:
		  Certification
		  Recertification

Column - Language	This list box is used to associate a language with a column.	
	Type	List Box
	Required	No
	DB Column	MasterScheduleColumn.SpokenLanguageCd
	Code ID	Spoken Language This code element is editable but this installed value is non-editable: Spanish
Column - Staff Person	This list box is used to associate a staff person with a column. When a staff person is selected the staff person's name is automatically entered into the Name textbox. When an already established schedule is accessed and the name is changed, the Change Column pop-up is displayed to associate a time period to a name change. See Change Column Pop-up for more information.	
	Type	List Box
	Required	No
	DB Column	MasterScheduleColumn.Stfp_ID
	Code ID	StaffPerson table lookup
Column - New	Clicking the New button causes a pop-up to be displayed so that a new column can be added to the right side of the schedule for the selected day, to all dates in the future, or for a date range.	
	Type	Command Button
	Hot Key	Alt + A

Control	Description	
Column - Remove	Clicking the Remove button causes a pop-up to be displayed so that the currently selected column in the schedule can be removed from the schedule for the selected day, to all dates in the future, or for a date range. To select a column to remove, click anywhere on the column.	
	Type	Command Button
	Hot Key	None
Template - Name	This list box is used to select a template to apply to the currently selected day's schedule.	
	Type	List Box
	Required	Yes, before applying to a day (Master Schedule Mode)
	DB Column	TemplateSchedule.Name
	Code ID	TemplateSchedule table lookup
Template - Apply	Clicking the Apply button causes the selected template to be applied to the currently selected day. This button only appears in Master Schedule mode.	
	Type	Command Button
	Hot Key	Alt + Y
Template - Remove	Clicking the Remove button deletes the currently selected template. The Remove button is only visible in template mode.	
	Type	Command Button
	Hot Key	None
Template - Save As or Master Schedule – Save As Template	Clicking the Save As button causes a Save As pop-up to appear allowing the user to name the Template that is being saved.	
	Type	Command Button
	Hot Key	None
Template – Clear or Master Schedule - Clear	Clicking the Clear button causes all the schedule information for the currently selected day, or all the template information, to be cleared. All open slots and columns are removed when this button is pressed.	
	Type	Command Button
	Hot Key	Alt + L
Template – Save or Master Schedule - Save	Clicking the Save button causes the schedule information for the currently selected day(s) to be saved.	
	Type	Command Button
	Hot Key	Alt + V

Business Rules

Context Menu Rules

1. Right-clicking on the scheduler opens a context menu, giving the user the following options:

    a. New Appointment: Creates a new open appointment slot and opens the Open Appointment Slot pop-up

    b. Open: Opens the Open Appointment Slot pop-up

    c. Copy: Copies the appointment.

    d. Delete: Deletes the appointment from the master schedule.

Clinic Closure Rules

2. No appointments can be scheduled (saved) for a day and time where a clinic closure is recorded.

3. When the clinic is closed or closed for a holiday display the closure or holiday text on the schedule.

4. Display message if appointments are already scheduled to times within the clinic closure.

Display of Appointments

5. Color code the open appointment slots based on their appointment type as described in the SC Scheduler - Appointments Screens DFDD.

General Business Rules

6. Don't allow the open time to be after the close time.

7. Limit the "selected days" number when copying days to 52. "52" applies to a selected day. Example: If Monday and Tuesday are selected, this means copying could be done for up to 52 Mondays and 52 Tuesdays.

8. Limit the application of a template to Scheduler to a rolling 12 months into the future.

9. Display error if Ending Date is >365 days from Today's Date.

10. Only active staff members of the current clinic are displayed in the Staff Person list box.

11. Allow open appointment slots to be resized with the mouse to extend or shorten the duration.

12. Allow open appointment slots to be drug with the mouse to different times and columns.

13. Allow multiple open appointment slots to be selected at once by holding down the Ctrl key.

14. Allow user to use Ctrl key to select multiple days within the calendar display.

15. When Ctrl key is being used to select multiple days on the calendar display, disable fields in the Copy This Day group box.

16. Allow user to copy and paste open appointment slots by holding down the Ctrl key, selecting the slot or slots to copy and dragging the mouse to create copies and paste them to where the mouse button is released.

17. When an area on the schedule is double-clicked create an open appointment slot with a start time of the area clicked and open the Open Appointment Slot Pop-Up to edit the open slot.

18. When applying a template or copying days to a day that already has open appointment slots and/or appointments delete the current open slots, apply the open slots from the

Business Rules

template, and keep the current appointments as overbooks.
19. When applying a template to a clinic day, only one template is applied to a single day. A clinic can only have one set of operating hours for a given day.
20. When shortening the Open time of a day don't allow the change if there are appointments or open appointment slots that would no longer fit into the open time.
21. When adding a column to a day or a set of days, the original template is not changed, the new column is added to the right of the already existing columns.
22. Display a confirmation message when Column - Remove button is selected.
23. Display a confirmation message when Template - Delete button is selected.
24. Display a confirmation message when Clear button is selected.
25. Don't allow a column to be deleted until all appointments and open appointment slots have been removed from it.

Developer Notes

1. Hide the Calendar and Copy This Day section when in template mode.
2. Hide the template Apply button when in template mode.
3. Hide the Master Schedule group box and its contents when in template mode.
4. Show the template Remove, Clear, Save As and Save buttons when in template mode.
5. Hide the template Remove, Clear, Save As and Save buttons when in Master Schedule mode.
6. Right-clicking on the time bar opens a context menu, giving the user the option to change the time interval and customize the time ruler's label, time zone, current time, and whether to use daylight savings time or not.
7. If the Column - Type drop down value selected is "None Selected" null the column value in the record.

1.1   Open Appointment Slot Pop-Up

The Open Appointment Slot Pop-Up is used to add, edit, and delete open appointment slots to the master schedule.   This pop-up is triggered when the user double-clicks on an open appointment area within the Schedule control.

Control	Description			
Subject	The title of the open slot.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	Yes	**Calculated**	No
	DB Column	Appointment.Subject		
Date	The Date of the open slot. Defaults to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	Appointment.StartTime		
Start Time	The Start Time of the open slot.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.StartTime		
End Time	The End Time and duration of the open slot.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.EndTime		
Unlabeled (next to End Time)	The open slot duration, that is, the difference between the start and end times for the appointment.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of "99 minutes"		
	Display Only	Yes	**Calculated**	Yes
	DB Column	NA		

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Control	Description		
Column Name(s)	The designated name(s) for the column(s) associated with the open slot. By clicking the arrow, a selection box of available columns is presented allowing for selection of multiple columns.		
	Type	List Box	
	Required	Yes	
	DB Column	MasterScheduleColumn.DisplayText	
	Code ID	MasterScheduleColumn table lookup	
Appointment Type	The Type of the open slot.		
	Type	List Box	
	Required	Yes	
	DB Column	Appointment.AppointmentTypeCd	

	Code ID	AppointmentType
		This code element is non-editable.
		The installed values are:
		  WIC Appointment
		  Personal Appointment
		  Non-WIC Appointment
		  Nutrition Education Class	

Appointment Type	The Type of WIC Appointment open slot.		
	Type	List Box	
	Required	Yes, if Appointment Type = WIC Appointment	
	DB Column	Appointment.AppointmentTypeCd	

	Code ID	WICApptointmentType
		This code element is editable but these installed values are non-editable:
		  Certification
		  Recertification	

Allow Overbooks	Checking this checkbox allows the appointment time period to be overbooked in a single column. If the checkbox is unchecked no other appointments can be created during the same time.		
	Type	Check Box		
	Display Only	No	**Calculated**	No
	DB Column	Appointment.OverBookAllowIn	

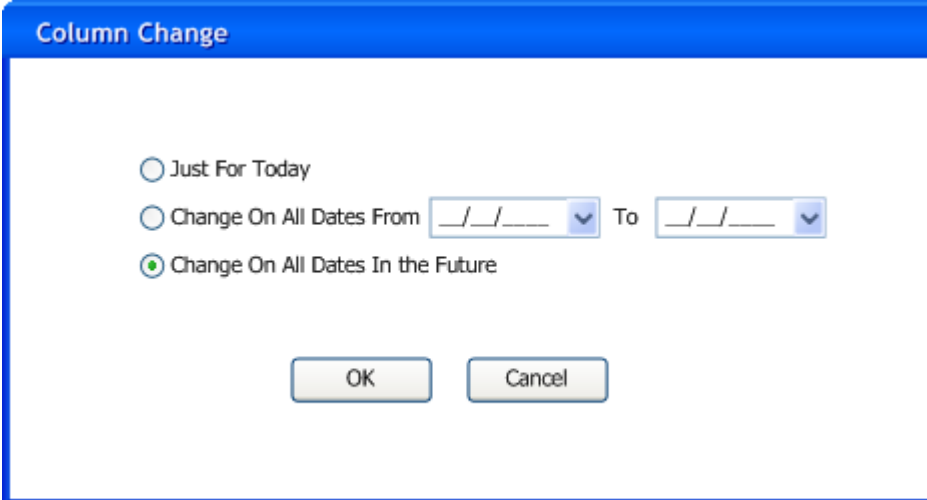| Control	Description	
OK	The OK button saves the open slot to the Master Schedule if it is a new slot or saves any changes to the slot if it's an existing slot.	
	Type	Command Button
	Hot Key	Alt + O
Cancel	The Cancel button causes the open slot to not be saved to the clinic schedule if it is a new slot or abandons the changes to the slot if it's an existing slot.	
	Type	Command Button
	Hot Key	Alt + L
Delete	The Delete button allows the user to delete the open slot from the clinic schedule.	
	Type	Command Button
	Hot Key	None

Business Rules
1. When a WIC appointment type is selected, automatically fill in the Subject and pop-up title with the text "Open " plus the WIC appointment type abbreviation plus the text " Slot".
2. When a Nutrition Education Class is selected, automatically fill in the Subject and pop-up title with the text "Open Nutr Ed Class Slot".
3. When a Personal appointment is selected, automatically fill in the Subject and pop-up title with the text "Personal Appointment."
4. When a Non-WIC appointment is selected, automatically fill in the Subject and pop—up title with the text "Non-WIC Appointment."
5. If the appointment type is a WIC appointment, disable the "Allow Overbooks" checkbox and default it to checked. WIC appointments can always be overbooked.
6. If the appointment type is a Nutrition Education Class, Personal Appointment, or Non-WIC appointment enable the "Allow Overbooks" checkbox.
7. Automatically default the duration of open WIC Appointment slots to the length defined in the WIC Appointment Details screen for the WIC Appointment Type selected. If no length is defined, default to 5 minutes.
8. Automatically default the duration of open Nutrition Education Class, Personal, and Non-WIC Appointments to the clinic appointment interval that has been selected.
9. Display a warning if an open slot is added to a column with an associated appointment type that is different than the appointment type of the open slot.
10. Start Time cannot be equal to or greater than End Time.

Developer Notes
1. Start time cannot be greater than end time. Display error.

1.2   Column Change Pop-Up

The Column Change Pop-Up allows the user to determine the period of time that a column is added or removed from the schedule. Additionally, this is displayed when a name of a column is changed so that a time period can be associated with the name change.

Control	Description			
Just For Today	Selecting this radio button causes the column change to affect only the selected day's schedule.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		
Change on All Dates From/To	Selecting this radio button causes the column change to affect dates within the date range.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		
Change on All Dates From/To (first)	This date is the beginning of the date range for the column change.			
	Type	Date Picker		
	Required	Yes, if Change On All Dates From/To is selected		
	Display Only	No	**Calculated**	No
	DB Column	Not Stored		
Change On All Dates From/To (second)	This date is the end of the date range for the column change.			
	Type	Date Picker		
	Required	Yes, if Change On All Dates From/To is selected		
	Display Only	No	**Calculated**	No
	DB Column	Not Stored		
Change On All Dates In the Future	Selecting this radio button causes the column change to affect all dates in the future.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		

Business Rules
1. The first Change On All Dates From/To cannot be greater than the second Change On All Dates From/To.

Developer Notes
1.

2   Processing Standards

Processing standards are used to ensure that applicants to the WIC Program are being scheduled within state specified guidelines. The guidelines vary depending on participant category, whether the applicant is migrant or homeless, and if they are a walk-in. The state has the option of making the processing standards more restrictive than federal policy by incorporating age break downs also. The state has the option of extending specific processing standards by 5 days. The processing standards are used when an appointment is being made for an applicant.

> *Scheduler Administration > Processing Standards*

Record Date 06/15/2006   < 1 of 99 >   New   Edit   X Delete

Effective Date   11/16/2006

End Date: 11/16/2007

*Local Agency ID 20   *Clinic ID 15

Processing Standards

	Category	Beginning Age	Ending Age	Homeless/ Migrant	Walk-In	Days Allowed	Extend By 5 Days
>	Breastfeeding			Yes	Yes	10	No
	Breastfeeding			No	No	20	No
	Infant	0 months	5 months	No	Yes	10	No

Add Row

Remove Row

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Control	Description			
New	Clicking the New button causes a new state processing standards record to be created.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit button allows the user to edit the fields of the pop-up.			
	Type	Command Button		
	Hot Key	Alt + T		
Delete	Clicking the Delete button allows the user to delete the processing standards record.			
	Type	Command Button		
	Hot Key	Alt + D		
Record Date	This is the record selector for the Processing Standards records. It contains the recorded date, which is today's date. The drop-down and spin control allow selection of historical Processing Standards records. When the New button is clicked, this date defaults to today's date.			
	Type	Record Selector Non-Editable		
	Contents	Formatted dates of "mm/dd/yyyy"		
	DB Column	ClinicProcessingStandard.RecordedDt		
Effective Date	This date is the date that the processing standards will be effective. This allows for policy changes to be incorporated into the system at a future date. This date must be equal to or greater than today's date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	ClinicProcessingStandard.EffectiveDt		

Control	Description		
End Date	This is a system filled date. It is the last day on which the processing standards are effective. This is filled in when a new processing standard record is created and an Effective Date captured. The end date is the Effective Date minus 1 day.		
	Type	Text Box	
	Required	Yes, if new processing standard record created with Effective Date	
	Length	NA	
	Validation	Mask of mm/dd/yyyy	
	Display Only	Yes	**Calculated** Yes
	DB Column	ClinicProcessingStandard.EndDt	
Local Agency ID	This is the local agency for which the Processing Standard record is being made. Only agencies that the user has access to are listed.		
	Type	List Box	
	Required	Yes	
	DB Column	Not Stored	
	Code ID	Clinic table lookup (FFLocalAgencyID field)	
Clinic ID	This is the clinic for which the Processing Standard record is being made. Only clinics that the user has access to are listed.		
	Type	List Box	
	Required	Yes	
	DB Column	ClinicProcessingStandard.Clinic_ID	
	Code ID	Clinic Table lookup (FFClinicID field)	
Add Row	Clicking the Add Row button causes another row to be added to the Processing Standards data grid.		
	Type	Command Button	
	Hot Key	Alt + A	
Remove Row	Clicking the Remove Row button causes the selected row to be removed from the Processing Standards data grid.		
	Type	Command Button	
	Hot Key	Alt + R	
Processing Standards	This is the data grid where processing standards are defined by participant category.		
	Type	Data Grid	
	Display	Yes	

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Control	Description	
Category	The selected participant category.	
	Type	List Box
	Required	Yes
	DB Column	ProcessingStandardCategory.ParticipantTypeCd

	Code ID	Part Type Cd
		This code element is non-editable.
		The installed values are:
		  Pregnant
		  Not Breastfeeding
		  Child
		  Infant
		  Breastfeeding

Beginning Age	The beginning age for the selected participant category. This column is only completed by user for the infant category. This allows state policy to be enforced even more granularly than federal policy.	
	Type	List Box
	Required	Yes, if Infant category is selected.
	DB Column	ProcessingStandardCategory.BeginningAgeCd

	Code ID	InfantAgeCd
		This code element is non-editable.
		The installed values are:
		  0 months
		  1 month
		  2 months
		  3 months
		  4 months
		  5 months
		  6 months
		  7 months
		  8 months
		  9 months
		  10 months
		  11 months
		  12 months

Control	Description	
Ending Age	The ending age for the selected participant category. This column is only completed by user for the infant category. This allows state policy to be enforced even more granularly than federal policy.	
	Type	List Box
	Required	Yes, if Infant category is selected.
	DB Column	ProcessingStandardCategory.EndingAgeCd

	Code ID	InfantAgeCd
		This code element is non-editable.
		The installed values are:
		  0 months
		  1 month
		  2 months
		  3 months
		  4 months
		  5 months
		  6 months
		  7 months
		  8 months
		  9 months
		  10 months
		  11 months
		  12 months

Homeless/Migrant	This indicates if the standard includes homeless/migrant applicants or not.	
	Type	List Box
	Required	Yes
	DB Column	ProcessingStandardCategory.HomelessorMigrantCd
	Code ID	YesNo
Walk-In	This indicates if the standard includes applicants who are walk-ins or not.	
	Type	List box
	Required	Yes
	DB Column	ProcessingStandardCategory.WalkInCd
	Code ID	YesNo

Control	Description		
Days Allowed	This indicates the number of days allowed from application date to appointment date that is assigned to the participant category, taking into account homeless/migrant and walk-in. If the span of time is greater than the days allowed, the user will be required to select a reason why they did not meet the processing standards.		
	Type	List Box	
	Required	Yes	
	DB Column	ProcessingStandardCategory.DaysAllowedCd	

	Code ID	Processing Standard Days
		This code element is non-editable.
		The installed values are:
		  10
		  15
		  20	

Extend By 5 Days	This indicates if the Days Allowed can be extended by 5 days for the participant category and associated characteristics.		
	Type	List Box	
	Required	Yes	
	DB Column	ProcessingStandardCategory.DaysAllowedExtendedCd	
	Code ID	YesNo	
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the processing standards record are displayed.		
	Type	Text Box	
	Required	NA	
	Length	NA	
	Validation	Mask of 'firstname lastname mm/dd/yyyy'	
	Display Only	Yes	**Calculated**	No
	DB Column	The most recent of ClinicProcessingStandard.ModifyStfpID + ClinicProcessingStandard.ModifyDt OR ProcessingStandardCategory.ModifyStfpID ProcessingStandardCategory.ModifyDt	

Business Rules
1. Only one set of processing standards can be effective at one time. The time periods covered cannot overlap.

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Business Rules

2. Display error if infant age ranges overlap.

Developer Notes

1.

3   WIC Appointment Details

WIC Appointment details are defined at the clinic level. The default duration is used to help staff estimate the necessary length of time to schedule for a WIC appointment. The shortened name is displayed when a longer name is not preferable because of space limitations.

> Scheduler Administration >WIC Appointment Details

WIC Appointment Details			
	WIC Appointment Type	**Abbreviated**	**Default Duration**
>	Certification	Cert	30
	Recertification	Recert	10

Control	Description	
New	Clicking the New button creates a new Appointment Duration record. The Record Date is auto-filled with today's date.	
	Type	Command Button
	Hot Key	Alt + N
Edit	Clicking the Edit button allows the user to edit the Appointment Duration record.	
	Type	Command Button
	Hot Key	Alt + T
Delete	Clicking the Delete button allows the user to delete the Appointment Duration record.	
	Type	Command Button
	Hot Key	Alt + D
Local Agency/Clinic	This is the record selector for the WIC appointment details records. It contains the local agency/clinics to which the user has access.	
	Type	Record Selector
	Contents	Local agency/clinic
	DB Column	AppointmentDuration.Cln_Id
WIC Appointment Details – WIC Appointment Type	This is a listing of all active WIC appointment types for the state.	
	Type	List Box
	Required	Yes
	DB Column	AppointmentDuration.AppointmentTypeCd

	Code ID	WICAppointmentType
		This code element is editable but these installed values are non-editable:
		  Certification
		  Recertification

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Control	Description		
WIC Appointment Details - Abbreviated	This allows an abbreviated name for a WIC appointment type to be designated. The abbreviated name is utilized when space is limited. This usage is described in business rules.		
	Type	Text Box	
	Required	No	
	Length	8	
	Validation	NA	
	Display Only	No	**Calculated**	No
	DB Column	AppointmentDuration.ShortName	
WIC Appointment Details – Default Duration	This is a listing of default durations for the type of WIC appointment in minutes. This information is used to set default durations for various types of WIC appointments when they are created.		
	Type	List Box	
	Required	No	
	DB Column	AppointmentDuration.ExpectedDuration	
	Code ID	ExpectedDurationCd This code element is non-editable. The installed values are: 5 10 15 20 25 30 35 40 45 50 55 60	

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Control	Description		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the appointment duration record are displayed.		
	Type	Text Box	
	Required	NA	
	Length	NA	
	Validation	Mask of 'firstname lastname mm/dd/yyyy'	
	Display Only	Yes	**Calculated**	No
	DB Column	AppointmentDuration.ModifyStfpID + AppointmentDuration.ModifyDt	

Business Rules
1. Each time this screen is displayed, retrieve all active WIC appointment types.
2. Add rows to the grid for any new WIC appointment types and set the default duration to 5 minutes.
3. Remove any rows from the grid of inactive WIC appointment types.

Developer Notes
1.